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Gateway User Guide

Submitting Completed Budget Forms

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Introduction

This user guide will assist you with submitting your forms after they have been completed. Once a form has been submitted, it can no longer be edited. This is the final step for most units in the Gateway Budget application. Submitting your forms is an essential step as it allows the Department to review and potentially certify your unit's budget.

Deadlines

Not all forms are due at the same time. The Form 3: Notice to Taxpayers should be submitted once it has been sent to be published. This allows the Department to post units' Notice to Taxpayers online through the Gateway public access site. The County Council Review Worksheet must be submitted by September 3, 2013. The Debt Worksheet only needs to be submitted if the unit is repaying a debt through a debt service fund. With the exception of the Form 3 and County Council Review Worksheet, all other forms are to be submitted within 48 hours of adopting the budget.

Outside of Gateway, Indiana Code 6-1.1-17-3 requires that the first publication of the Notice to Taxpayers must be before September 14, and the second publication must be before September 21. Please contact your Field Representative regarding additional advertising and other deadlines.


Signing the Form Electronically

At the bottom of all the forms except Form 3 and Form 4, there is a box for you to place an electronic signature on the form. Only the user with submission rights will see the signature box.


Form Signature

NAME

TITLE

SIGNATURE/PIN
 

DATE

 **SIGN AND DATE FORM**

I hereby acknowledge that the submission of this document through the Gateway password and PIN system constitutes an "electronic signature" as defined in IC 5-24-2-2. This submission is intended to, and hereby does, constitute authentication and approval of the submitted document as required by the Indiana Code. I understand that this electronic signature takes the place of my handwritten signature and accomplishes the same purposes as would my handwritten signature in the same circumstance. I further acknowledge that this electronic signature has the same force and effect as my handwritten signature and can and will be used for all lawful purposes. I affirm that I have the real and apparent authority to electronically sign and submit this document on behalf of the unit.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN. This PIN has been sent to the person with submission rights via email. You may contact the DLGF at gateway@dlgf.in.gov or at (317) 232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.

Form Signature

NAME
John Smith

TITLE
Auditor

SIGNATURE/PIN
••••

DATE
06/12/2012

Form signature values saved at 02:54 PM and 58 seconds.

✓ SIGN AND DATE FORM

Once you see the red text stating “Form signature values saved,” you have successfully signed your form. Each form will need to be signed individually prior to submitting.

Validation/Required Fields

Most forms in Gateway have some type of validation that must be satisfied before the form can be marked as Ready to Submit and then be submitted. Due to the variety of units that submit budgets, validation can only check for very basic criteria. As a result, although the Ready to Submit option appears, it does not mean that the form is necessarily complete.

At the bottom of each form is the Ready to Submit status box. An example of Form 1’s is shown below.

⚠ Not Ready To Submit ⓘ

You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.

Each form’s Ready to Submit status box contains a list of all the validation that must be met in order to be able to submit the form. The Form 1 example above reads,

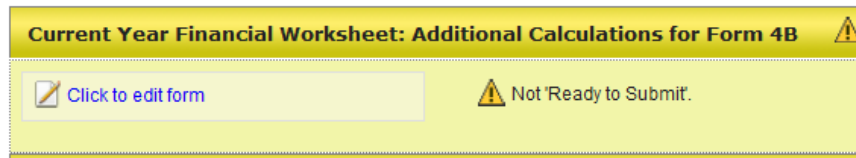
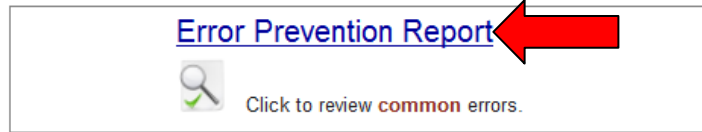
“You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.”

In Form 1, Gateway will check to make sure that the form has been signed and at least one amount has been entered in both the published and adopted columns. It is possible to submit your Form 1 with only a single line item as long as both amounts are entered; this is why is very important to review the forms yourself for accuracy and completeness prior to submitting them.

Each form will have its own validation which can be reviewed by reading the “Not Ready to Submit” box at the bottom of the form. As long as you complete your forms entirely and completely, you should not encounter any issues in marking the form as “Ready to Submit.”

Error Prevention Report

A new addition to Gateway is the Error Prevention Report that is designed to help users prevent basic commonly made mistakes found in previous years. It is **highly recommended** that this report be ran before publishing, adopting and submitting. Any error that appears should be reviewed to better ensure accuracy. The link to this report can be found on top of the Budget Form Menu.



You will then be taken to the Error Prevention Report. The potential errors in this report are divided into two sections: errors to review prior to publishing, and errors to review after publishing. The determining factor on which errors appear is the submission status of Form 3. In order to view the current potential errors, please click, “Run Error Audit.” Please be sure to review these errors before you publish your Form 3: Notice to Taxpayers and later review the new list of errors after publishing.

Error Prevention Report

Please take the time to address the following issues as they frequently indicate errors. Once an issue is corrected, it will be removed from the list. **This tool will not find all possible mistakes, but is designed to catch the most common ones.** For assistance resolving these issues, please contact the DLGF at gateway@dlgf.in.gov or 317-232-3777.

Some errors will appear if the forms are not yet complete.

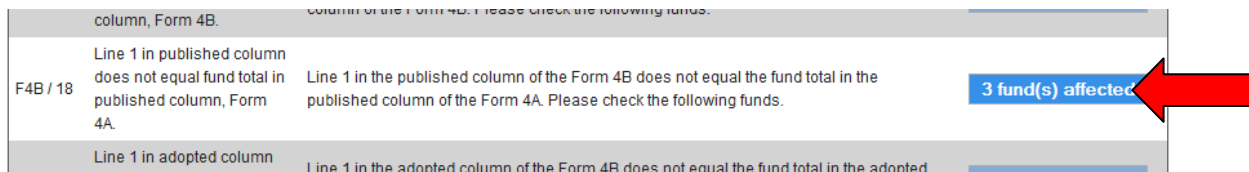
Run Error Audit

Once the “Run Error Audit” is clicked, a list of potential errors will populate the page below. It is very important to note that **this report will not find all possible mistakes, but is designed to catch the most common ones.**

Form / Error #	Error	Details	Funds Affected
CYFW / 24	Line 9 does not equal Line 2, published column, Form 4B.	Line 9 "Estimated Current Year Expenditures July through December" on the Current Year Financial Worksheet does not equal Line 2 "Necessary expenditures, July 1 to December 31 of present year, to be made from appropriation unexpended" on the published column of the Form 4B. Please check the following funds.	1 fund(s) affected
CYFW / 28	Line 15 does not equal Line 6, published column, Form 4B.	Line 15 "June 30 Cash Balance, including investments" on the Current Year Financial Worksheet does not equal Line 6 "Actual cash balance, June 30 of present year (including cash investments)" on the published column of the Form 4B. Please check the following funds.	1 fund(s) affected
CYFW / 29	Line 16 does not equal Line 7, published column, Form 4B.	Line 16 "Taxes to be collected, present year (December settlement)" on the Current Year Financial Worksheet does not equal Line 7 "Taxes to be collected, present year (December settlement)" on the published column of the Form 4B. Please check the following funds.	1 fund(s) affected

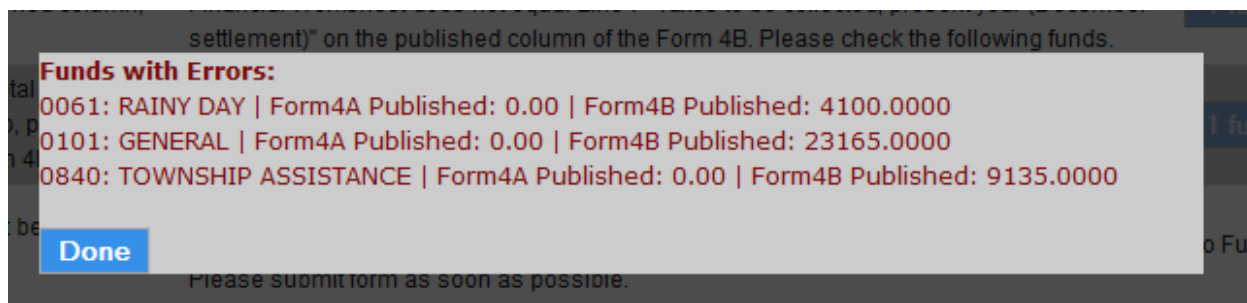
This will list the errors as categorized by the form and number of errors, the error, a description of the error and a link to display the funds that are affected by this error.

To view the list of affected funds, click the blue “# fund(s) affected” button.



column, Form 4B.	Column of the Form 4B. Please check the following funds.	
F4B / 18 Line 1 in published column does not equal fund total in published column, Form 4A.	Line 1 in the published column of the Form 4B does not equal the fund total in the published column of the Form 4A. Please check the following funds.	3 fund(s) affected
Line 1 in adopted column	Line 1 in the adopted column of the Form 4B does not equal the fund total in the adopted	

Once the funds affected button has been selected, a list of the funds containing the error will appear.



Funds with Errors:

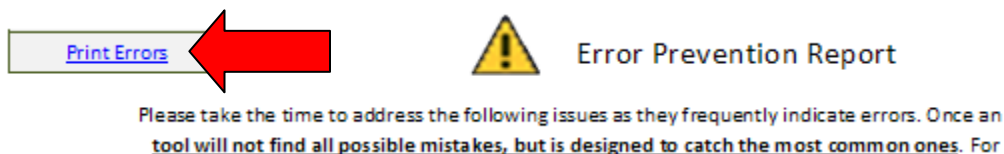
0061: RAINY DAY | Form4A Published: 0.00 | Form4B Published: 4100.0000

0101: GENERAL | Form4A Published: 0.00 | Form4B Published: 23165.0000


0840: TOWNSHIP ASSISTANCE | Form4A Published: 0.00 | Form4B Published: 9135.0000

[Done](#)

Some officials may find it useful to print out the errors. This page can be printed through the print option on the right-hand side of the page.



[Print Errors](#)

 **Error Prevention Report**

Please take the time to address the following issues as they frequently indicate errors. Once an tool will not find all possible mistakes, but is designed to catch the most common ones. For

As errors are corrected they will be removed from the list the next time you click “Run Error Audit.” It is important to re-run the report by clicking “Run Error Audit” to view an updated list of errors. Please remember that once your Form 3 is submitted, Gateway will begin checking for additional errors once you re-run the report.

Marking the Form “Ready to Submit”

As previously mentioned, at the bottom of each form are the “Ready to Submit” status boxes. Before you complete the form you will notice a grey box that is titled “Not Ready to Submit.”

Continued from last year, the 2014 budget forms have a feature built in called validation. This does not allow the form to be marked as “Ready to Submit”, or be submitted until the required fields are completed. Validation will help prevent some commonly found errors. Under a closer look, you will notice that each grey “Not Ready to Submit” box states the validation for each form.

⚠ Not Ready To Submit ⓘ

You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.

Once all the listed validation has been completed, users will then have the ability to mark the form as ready to submit by clicking on the check box. This year, users with either submission or editing rights will be able to mark the form as “Ready to Submit.” You will not want to check this box until you can confirm that the form is complete and correct. Validation can only check for certain basic things, only you can confirm that the form truly is ready to submit.

☐ Ready to Submit ⓘ

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. Your form can still be edited until it is submitted.

☒ Ready to Submit ⓘ

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

Submitting a Form

Note that after form has been marked as “Ready to Submit”, the form under the Budget Form Menu now shows a green submit option.

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate ⚠

✎ Click to edit form

➡ Click to submit completed form to DLGF

If you have completed your form and will not need to make any changes, you may click on the green “Submit” button. You will notice a pop-up box asking you if you are sure you want to submit this form. If you are sure simply press “OK”.




⚠

Are you sure you want to submit this form?











Cancel

OK

As depicted below, the form on the Budget Form Menu will now appear green and the only option available is to view the form.

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate 	
 Click to view form	 This form has been submitted.

You will continue submitting your remaining forms, with the exception of Debt Worksheet if it is not applicable.

Current Year Financial Worksheet: Additional Calculations for Form 4B	
Debt Worksheet	
Form 1: Budget Estimate	
Form 2: Estimate of Miscellaneous Revenues	
Form 3: Notice to Taxpayers	
Form 4: Ordinance / Resolution of Appropriations and Tax Rates	
Form 4A: Budget Report	
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate	
 Click to view form	 This form has been submitted.

Please also ensure the County Council Review Worksheet is submitted from the Unit Main Menu by September 3, 2013. The Sign and Submit button will save the signature and submit the worksheet in a single click.

You may no longer edit a form once it is submitted. If you have submitted a form by mistake please contact the DLGF at gateway@dlgf.in.gov or at (317) 232-3777.

Congratulations! You have successfully submitted your budget forms. You will also need to scan and upload certain documents such as your Proof of Publication and your Signed Form 4. Please see our other user guides for assistance with other portions of the budget. If you have any questions, please email the Gateway inbox at gateway@dlgf.in.gov.